

# **Back-Up Tape Tracker™**

**Trends for LTO, DLT-S, DLT-V, DAT, 8 mm, and QIC Media Markets**

## **Executive Summary**

**Q3 2011**

Back-up tape cartridge sales amounted to \$178.21 MM in the Third Quarter. LTO accounted for 89.2% of total with sales of \$158.89 MM. The media market is expected to have sales of \$157.76 MM in the next quarter.

Total LTO sales were off at 5.6 MM units in Q3. LTO-5 was a bright spot with 12% growth. It accounted for 18% of unit sales and 36% of dollars. LTO-4 was marginally up. Its sales represented 47% of units and 37% of dollars. LTO-3 sales were down. They accounted for 26% of volume and 19% of dollars. LTO-2 was also lower. It accounted for 8% of units and 7% of dollars. LTO-1 was up. It sold 1% of units and 1% of dollars. **Hewlett-Packard (H-P)** led the LTO market with a 32% share. **Fuji** was the second largest supplier and **IBM** was third. In Q4 LTO total volume is expected to be relatively steady, supported by higher volumes of LTO-5 and LTO-4. Sales of earlier generations are expected to decline.

The DDS/DAT cartridge volume decreased to .7 MM units in Q3. DAT-72 accounted for 42% of unit sales and 46% of the value of the segment. DAT-160 accounted for 21% of the value of the segment and DAT-320 took 8%. H-P led the DDS/DAT market with a 72% share. Segment dollar sales amounted to \$8.23 MM.

DLT-S cartridge sales amounted to .1 MM units. H-P led the segment. It was followed by **Quantum** and **Imation**. DLT-S dollar sales are expected to be off to \$4.90 MM in Q4.

DLT-V sales were down at .04 MM units. Their value was \$1.43 MM. Quantum led the segment with a 41% share. H-P was second at 26%. DLTtape™ IV cartridges accounted for 66% of units. Sales of DLT-V are expected to be down in Q4.

AIT media supports its respective installed bases of drives. Total AIT cartridge volume in the quarter amounted to .05 MM units. **Sony** had a 92% share in the segment.

Shipments of QIC cartridges in the quarter totaled .02 MM units. Their value was \$1.57 MM. **Imation** dominated the segment with a market share of 94%.

The 8 mm metal particle cartridge amounted to .01 MM units worth \$0.07 MM. Imation led the segment with a 35% market share. **Tandberg** supplied 8 mm metal evaporated cartridges for its VXA and Mammoth drives. Sales were .03 MM units in the quarter.

For additional information about Back-Up Tape Tracker and Santa Clara Consulting Group or to place orders, please e-mail [dbunzel@sccg.com](mailto:dbunzel@sccg.com) or call +650-938-6945 or +416-932-8407.

# Back-up Tape Tracker™

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